

2009 Michigan HFMA Spring Conference & Golf Outing Conference Session Descriptions & Speakers

Breakout D: Managing Your Investment Portfolio in a Balance Sheet Context Nicholas Bauer, CFA, Senior Consultant, MBO Cleary & Joseph Hickey, CFA, Senior Consultant, Cleary Gull

Description: The program will provide participants with a detailed overview of the current economic downturn including “how we got here and where we are going.” The session will review constructing and monitoring the organization’s investment portfolio within a balance sheet context and industry best practices. We will demonstrate the impact variables including liability structure, capital plans and operating environment can have on asset allocation and investment policy development. We will give examples of risk metrics that can be applied to the investment portfolio to better mitigate balance sheet risk and reduce the chance of violating bond covenants.

About the Presenter: Nicholas Bauer is a Senior Consultant with MBO Cleary. Prior to joining MBO Cleary, Mr. Bauer worked for The Ziegler Companies where his duties included working with not-for-profit health care and senior living organizations with investment policy development, asset allocation and risk management. In addition, his duties included performance analytics, product research, institutional distribution and consultant relations. Prior to joining Ziegler, Mr. Bauer previously worked for Merrill Lynch, Bank of New York and a regional broker/dealer firm, where he was responsible for the implementation of the firm’s investment advisory platform as well as researching separately managed accounts.

Mr. Bauer received a B.B.A. in Finance from the University of Wisconsin-Milwaukee and is a member of the CFA Institute, Investment Analyst Society of Chicago, Healthcare Financial Management Association and Rogers Memorial Hospital Foundation Board of Directors. He has been a frequent speaker at state and national conferences speaking on topics such as asset allocation, alternative investments and investment policy development. He is Series 7, 24, 63 and 65 licensed and holds the Chartered Financial Analyst (CFA) designation.

Joseph Hickey is a Senior Consultant with Cleary Gull. Prior to joining Cleary Gull, Mr. Hickey was Managing Director of Investment Banking with Tucker Anthony Sutro Capital Markets where his duties included syndicating and underwriting the firm’s public and private equity offerings. In his role at Cleary Gull, Mr. Hickey is responsible for advising institutional and high net worth client regarding portfolio construction, asset allocation, investment policy development and risk management. He is a member of the firm’s investment policy committee, contributing to Cleary Gull’s economic forecasts and capital market assumptions.

Mr. Hickey received a BBA in Economics from the University of Wisconsin-Madison and is a member of the CFA Institute and the Investment Analyst Society of Milwaukee. He is a frequent speaker at investment industry and business leader forums on topics such global economics, portfolio management and investment market bubbles. He is Series 7, 24 and 65 licensed and holds the CFA designation. Mr. Hickey holds a Commercial, Multi-Engine Instrument rating and flies a Beechcraft Baron.

Breakout E: A Review of the New PRRB Instructions Joan L. Lowes, Esq., Shareholder, Hall Render Killian Heath & Lyman PLLC

Description: The presentation will highlight key changes to the PRRB appeals process for both individual and group appeals. Attendees will be provided a reliable and practical tool that they can take back to the office for future reference.

About the Presenter: Joan L. Lowes is a shareholder with the Health Law Department and focuses her practice in the areas of reimbursement, certificate of need, regulatory compliance and managed care. She earned her law degree from the University of Maryland in 1979. Joan is a member of the American Health Lawyers Association, the Healthcare Financial Management Association, and is 2008-09 Chair of the Substantive Law Committee of the Health Care Law Section for the State Bar of Michigan. She previously served as Assistant General Counsel at Blue Cross Blue Shield of Michigan (1992-2003) and Assistant Regional Counsel for the U.S. Department of Health and Human Services in Chicago, Illinois.

WEDNESDAY, May 20, 2009

11:30 am - 5:00 pm	Golf Outing at the Pohl Cat Golf Course - cookout lunch, shot gun start, and awards to follow
6:00 pm - 9:00 pm	Conference Registration
6:00 pm - 9:00 pm	Hospitality Reception - Drinks and Mexican Buffet

THURSDAY, May 21, 2009

7:30 am - 4:00 pm	Conference Registration		
7:30 am - 8:45 am	Breakfast Buffet in the Exhibit Hall		
8:45 am - 9:00 am	Conference Welcome and Opening Comments		
9:00 am - 10:30 am	Keynote Address: Health Reform and Health Transformation: Perspectives from Washington David Merritt		
10:30 am - 11:00 am	Morning Break in the Exhibit Hall		
11:00 am - 12:15 pm	Breakout A Medicare & Medicaid Update Vickie Seal	Breakout B Update On Select Medicare Appeal Issues Kenneth R. Marcus	Breakout C EDI Update - 5010 and ICD-10 Jim Whicker, CPAM
12:15 pm - 1:30 pm	Lunch Break in the Exhibit Hall		
1:30 pm - 3:00 pm	General Session: I Can Do That! Suzie Humphreys		
3:00 pm - 3:30 pm	Afternoon Break in the Exhibit Hall		
3:30 pm - 5:00 pm	Breakout D Managing Your Investment Portfolio within a Balance Sheet Context Nicholas Bauer, CFA & Joseph Hickey, CFA	Breakout E A Review of the New PRRB Instructions Joan L. Lowes, Esq.	Breakout F Implementation of the Medicare RACs Christine Cox, CCS & Jua'nese Williams, PhD
5:30 pm - 8:00 pm	Cocktails, Dinner & Networking in the Exhibit Hall		

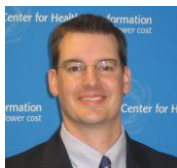
FRIDAY, May 22, 2009

8:00 am - 9:00 am	Conference Registration		
8:00 am - 9:00 am	Exhibits Open	Continental Breakfast	
9:00 am - 10:00 am		General Session: Patient Friendly Billing - Infusing the Human Element Sheldon Mandelbaum, Corporate Director of Revenue Cycle, Henry Ford Health System Richard Milliman, Director of the Henry Ford Medical Group Revenue Cycle	
10:00 am - 10:30 am		Morning Break	
10:30 am - Noon		General Session Continued	
Noon - 1:00 pm		Lunch Break	

2009 Michigan HFMA Spring Conference & Golf Outing Conference Session Descriptions & Speakers

Key Note: Health Reform and Health Transformation: Perspectives from Washington
David Merritt, Project Director, Center for Health Transformation and the Gingrich Group

Description: Policymakers debate major changes to our health system, from expanding coverage to payment reform to health information technology. Many industry stakeholders are not waiting for lawmakers and have introduced disruptive technologies and services that are transforming healthcare from the bottom up. This session will cover the latest legislative developments from Washington and the market trends of engaging consumers through transparency and technology.



About the Presenter: David Merritt is a project director at the Center for Health Transformation and the Gingrich Group. The Center, headed by former Speaker Newt Gingrich, is a collaboration of leaders dedicated to transforming health and healthcare in America. Mr. Merritt advises Speaker Gingrich and leads the Center's projects on health information technology and expanding coverage to the uninsured, with additional expertise in Medicare, consumerism, and transparency.

Mr. Merritt is the editor of *Paper Kills: Transforming Health and Health with Information Technology*, winner of the 2007 book of the year award by the Health Information Management Systems Society (HIMSS). His writing has been widely published, including the *Chicago Tribune*, *Boston Globe*, *Chicago Sun-Times*, *Atlanta Journal-Constitution*, and the *Miami Herald*. He is widely quoted in national and trade press, including the *Wall Street Journal* and Associated Press, and a frequent speaker in the industry. He has been a guest lecturer at the Yale School of Management and at Princeton University, at the invitation of visiting professor and former Senate Majority Leader Bill Frist.

Mr. Merritt was a health policy adviser to the presidential campaign of Senator John McCain, having served the same role with former Senator Fred Thompson. He served on Virginia Governor Tim Kaine's Health Information Technology Council, where he chaired the Business Case Subcommittee. He also served on the Improving Quality Workgroup of Governor Kaine's Health Reform Commission. He has testified before state and federal hearings, including the U.S. Senate Judiciary Committee. He serves on several advisory boards, as well as on the board of commissioners of the Certification Commission for Healthcare Information Technology (CCHIT).

Prior to joining the Center, Mr. Merritt was with America's Health Insurance Plans. He earned his Master's degree in political science and government from Loyola University Chicago, and he earned his Bachelor's degree from Western Michigan University.

Breakout A: Medicare & Medicaid Update
Vickie Seal, Director of Finance, Michigan Health & Hospital Association

Description: This session will highlight recent policy changes that impact hospital reimbursement by Medicare and Medicaid, including the FY 2010 IPPS proposed rule. Other rules such as the inpatient rehabilitation facility and SNF proposed rules will also be reviewed.

About the Presenter: Vickie is Director of Finance in the Policy Division at the Michigan Health & Hospital Association. Since joining the MHA in Aug. 2001, Vickie's efforts have been focused on health policy issues for the major payers, primarily Medicare and Medicaid, including hospital reimbursement, wage index, and the quality assurance assessment program (QAAP). She has also been the MHA liaison to the Michigan Patient Accounting Association (MPAA). Other activities include involvement in the Western Michigan HFMA chapter where Vickie served as chapter president in 2007-08.

Prior to joining the MHA, Vickie was a reimbursement specialist at Sparrow Health System in Lansing. She began her career in the reimbursement department of Hospital Corporation of America (HCA) in Nashville, TN and worked there for nine years, prior to relocating to Michigan in 1998. Vickie has a BBA in Accounting from Belmont University in Nashville.

2009 Michigan HFMA Spring Conference & Golf Outing Conference Session Descriptions & Speakers

Breakout B: Update on Select Medicare Appeal Issues Kenneth R. Marcus, Partner, Honigman Miller Schwartz and Cohn LLP

Description: This presentation will provide an update on "hot topics" for Medicare appeals, including: Indirect and Graduate Medical Education, Disproportionate Share Hospital (DSH) payments, and Bad Debts.

About the Presenter: Kenneth R. Marcus is a partner with the law firm Honigman Miller Schwartz and Cohn LLP. Mr. Marcus is a nationally recognized expert in Medicare and Medicaid reimbursement appeal matters and has successfully represented numerous hospitals both in individual and group appeals before the PRRB and the federal courts. Subject areas that Mr. Marcus routinely advises clients on include such issues as Fraud and Abuse provisions, the Stark Act, and the Federal False Claims Act as well as representing clients in major business transactions such as acquisitions and mergers, contracting matters, and joint ventures.

Breakout C: EDI Update - 5010 and ICD-10 Jim Whicker, CPAM, Director of EDI, Intermountain Healthcare

Description: The Final Rules for ICD-10 and 5010 are out. This presentation will provide insight on:

- What changes will be seen in the industry
- What should providers do to prepare
- What will we gain, and what are the things to watch out for

About the Presenter: Jim Whicker is Director of EDI in the Revenue Cycle Organization at Intermountain Healthcare in Salt Lake City, Utah. Jim is responsible for implementing HIPAA Transactions and Code Sets within Patient Accounts at Intermountain.

Jim serves as national EDI Liaison for the American Association of Healthcare Administrative Management (AAHAM). He was formerly Chair of the Claim Adjustment Reason, Claim Status Reason Code, and Health Care Decision Reason Code committee. The committee reviews and approves changes, additions, and deletions to these code sets used in HIPAA transactions.

Having served in various positions on the board and executive committee of WEDI since 2001, Jim is currently serving as Past Chair for the Workgroup for Electronic Data Interchange, having served as chair for 2007/2008. At WEDI, he co-chaired the WEDI PAG on DDE and served as a panel member for the WEDI HIPAA TCS Implementation Hearing and the WEDI task group on Acknowledgements.

Jim is also an active participant of UHIN, where he has been involved since the organization's inception. He received his BA-Finance from Utah State University and resides in Salt Lake City, Utah.

General Session: I Can Do That! Thursday Suzie Humphreys

Description: Suzie has a way with laughter, poignant stories and jump-start inspiration, of confirming that fear doesn't have to be the motivating force that stops us from living life to its fullest. We say we will "one day!" One Day comes and goes and we are left regretting that it was not life that passed us by at all but rather our decision to LIVE IT! This is about saying "yes" instead of "no"...about not telling ourselves "we can't," "it's too hard," "I'll never be able to"...This presentation is perfect for anyone who needs a lift up not from outside, but from within.



About the Presenter: Suzie Humphreys background is as varied as her audiences... from administrative secretary to television talk show host, to 20 years in radio. She has hobnobbed with movie stars and politicians interviewed the great and the 'near' great. She has made hundreds of commercials, done musical comedy, and motion pictures. She has been fired, been broke, been disappointed, been a petrified expectant mother at 40, and lived her life with a passion for learning not only how to be better, but how to see things differently.

Suzie received one of the longest standing ovations, from 2,500 of her peers, on record at the National Speakers Association Conference in Palm Springs, CA. At the 2008 national conference she received the Council of Peers Award of Excellence and was inducted in the Speaker Hall of Fame. In 2004, Suzie was also inducted into the Texas Radio Hall of Fame.

2009 Michigan HFMA Spring Conference & Golf Outing Conference Session Descriptions & Speakers

Breakout D: Managing Your Investment Portfolio in a Balance Sheet Context Nicholas Bauer, CFA, Senior Consultant, MBO Cleary & Joseph Hickey, CFA, Senior Consultant, Cleary Gull

Description: The program will provide participants with a detailed overview of the current economic downturn including “how we got here and where we are going.” The session will review constructing and monitoring the organization’s investment portfolio within a balance sheet context and industry best practices. We will demonstrate the impact variables including liability structure, capital plans and operating environment can have on asset allocation and investment policy development. We will give examples of risk metrics that can be applied to the investment portfolio to better mitigate balance sheet risk and reduce the chance of violating bond covenants.

About the Presenter: Nicholas Bauer is a Senior Consultant with MBO Cleary. Prior to joining MBO Cleary, Mr. Bauer worked for The Ziegler Companies where his duties included working with not-for-profit health care and senior living organizations with investment policy development, asset allocation and risk management. In addition, his duties included performance analytics, product research, institutional distribution and consultant relations. Prior to joining Ziegler, Mr. Bauer previously worked for Merrill Lynch, Bank of New York and a regional broker/dealer firm, where he was responsible for the implementation of the firm’s investment advisory platform as well as researching separately managed accounts.

Mr. Bauer received a B.B.A. in Finance from the University of Wisconsin-Milwaukee and is a member of the CFA Institute, Investment Analyst Society of Chicago, Healthcare Financial Management Association and Rogers Memorial Hospital Foundation Board of Directors. He has been a frequent speaker at state and national conferences speaking on topics such as asset allocation, alternative investments and investment policy development. He is Series 7, 24, 63 and 65 licensed and holds the Chartered Financial Analyst (CFA) designation.

Joseph Hickey is a Senior Consultant with Cleary Gull. Prior to joining Cleary Gull, Mr. Hickey was Managing Director of Investment Banking with Tucker Anthony Sutro Capital Markets where his duties included syndicating and underwriting the firm’s public and private equity offerings. In his role at Cleary Gull, Mr. Hickey is responsible for advising institutional and high net worth client regarding portfolio construction, asset allocation, investment policy development and risk management. He is a member of the firm’s investment policy committee, contributing to Cleary Gull’s economic forecasts and capital market assumptions.

Mr. Hickey received a BBA in Economics from the University of Wisconsin-Madison and is a member of the CFA Institute and the Investment Analyst Society of Milwaukee. He is a frequent speaker at investment industry and business leader forums on topics such global economics, portfolio management and investment market bubbles. He is Series 7, 24 and 65 licensed and holds the CFA designation. Mr. Hickey holds a Commercial, Multi-Engine Instrument rating and flies a Beechcraft Baron.

Breakout E: A Review of the New PRRB Instructions Joan L. Lowes, Esq., Shareholder, Hall Render Killian Heath & Lyman PLLC

Description: The presentation will highlight key changes to the PRRB appeals process for both individual and group appeals. Attendees will be provided a reliable and practical tool that they can take back to the office for future reference.

About the Presenter: Joan L. Lowes is a shareholder with the Health Law Department and focuses her practice in the areas of reimbursement, certificate of need, regulatory compliance and managed care. She earned her law degree from the University of Maryland in 1979. Joan is a member of the American Health Lawyers Association, the Healthcare Financial Management Association, and is 2008-09 Chair of the Substantive Law Committee of the Health Care Law Section for the State Bar of Michigan. She previously served as Assistant General Counsel at Blue Cross Blue Shield of Michigan (1992-2003) and Assistant Regional Counsel for the U.S. Department of Health and Human Services in Chicago, Illinois.

2009 Michigan HFMA Spring Conference & Golf Outing Conference Session Descriptions & Speakers

Breakout F: Implementation of the Medicare Recovery Audit Contractors (RAC) - What to expect and how to get your organization ready!
Christine Cox, CCS, CPC-H, CHI, FCS, Manager, Coding and Chargemaster
Jua'nese L. Williams, PhD, MBA, BS, CPUR, IQCI, C-CDI, Manager, Coding and Chargemaster
Besler Consulting

Description: During this session, participants will learn about the RAC program including the Scope of Work changes between the Demonstration and Permanent Programs, how does it differ from other CMS audit initiatives, and how will it affect your organization. The presentation will also provide a look at the findings from the Demonstration Program - Inpatient, Outpatient, Physician, DME, etc. - as a means to identify what are the risk areas for your organization and how to start analyzing your data today to prepare for the RAC. What can you expect from the RAC? From an operational and process standpoint, the presentation will help you look at where are you now, what are your weak areas, and what is your potential financial impact. The presentation will wrap up with an Action Plan - What can you start today? What areas do you need to assess? - and a list of issues to start on preparation immediately for your organization.

About the Presenter: Christine Cox, CCS, CPC-H, CHI, FCS, is a Manager of Coding and Chargemaster for Besler Consulting. Christine brings with her nearly twenty (20) years of experience in directing coding, revenue cycle and documentation improvement engagements for inpatient and outpatient facilities. For the past ten (10) years Christine has also been an instructor for both private (hospitals, medical practices) and college training programs in the healthcare field with the focus on revenue cycle improvement and compliance. She participated in the editing process for "*Hospital Billing and Coding*" (2006) and "*Medical Assisting*" (2007), both released by Elsevier/Saunders. Her article on Chargemaster Compliance was published in the HCCA's *Compliance Journal* (2007). She co-authored the Chargemaster Compliance chapter for the CCH Compliance Professional's Manual (2008). She has presented numerous seminars and webinars on topics such as the MS-DRGs, RACs, Clinical Documentation Improvements, and revenue enhancement through coding improvements. Christine successfully achieved the designations of Certified Healthcare Instructor (CHI), Certified Professional Coder for Hospitals (CPC-H), Facility Coding Specialist (FCS), and Certified Coding Specialist (CCS).

About the Presenter: Jua'nese L. Williams, PhD, MBA, BS, CPUR, IQCI, C-CDI, is a Manager of Coding and Chargemaster for Besler Consulting. Dr. Williams is committed to the success and excellence of healthcare organizations throughout the continuum of care. She is an expert in Utilization Review/Case Management Programs and an InterQual Certified Instructor. She is considered an authority on CMS Program Integrity regulations including (RAC) and (MIC) programs and Federal Healthcare Policy.

She is a Certified Instructor for nationally accredited program for Clinical Documentation Improvement Specialist. She also specializes in MS-DRG assignment and validation, and Physician/Outpatient Coding. Prior to joining Besler Consulting, she was a Clinical Education Consultant, Certified Instructor and co-author of the Certified Professional in Utilization Review and the Certified Professional in Healthcare Management programs for McKesson Health Solutions. She was the President and owner of a healthcare consulting firm, and Vice President for a Medicare Advantage plan in Florida. Dr. Williams holds a PhD in Health Care Administration and MBA from Kennedy-Western University.

2009 Michigan HFMA Spring Conference & Golf Outing

Conference Session Descriptions & Speakers

General Session: Patient Friendly Billing - Infusing the Human Element
Friday Sheldon Mandelbaum, Corporate Director of Revenue Cycle, Henry Ford Health System
Richard Milliman, Director of the Henry Ford Medical Group Revenue Cycle

Description: This interactive presentation will explore what health care providers need to do to be more successful in delighting patients. Real patient experiences related to the financial aspects of care will be featured. Through audience participation and discussion we will explore what consumerism really means through the patient's eyes.

- How does the patient define consumerism and "patient friendly?"
- How well have organizations transformed and adapted communications in the consumer retail environment?
- What are the retail driven choices within health care? What does it mean to be a good advocate for the consumer - focusing on compassion, clarity and collaboration?
- Why after all we have done, is it still so hard to please our patients?



About the Presenter: Sheldon Mandelbaum currently serves as the Corporate Director of Revenue Cycle for the Henry Ford Health System and has been involved in Revenue Cycle operations for 30 years. Sheldon has creatively brought clinical providers together with operational and financial leaders to create an innovative patient centric delivery system that maximizes net revenue. Sheldon participated in the HFMA National Patient Friendly Billing Committee and is a member of HFMA Eastern Michigan chapter.



About the Presenter: Richard Milliman is the Director of the Henry Ford Medical Group Revenue Cycle representing a wholly owned group practice of over 11000 physicians. With a history of various operational roles in the Henry Ford Health System for 25 years he has been involved with the many aspects of revenue generation. Facilitating patient facing operations including Quality and Pay for Performance, Consumer pricing, Patient Financial Assistance Programs and Point of Service Cash processing. He brings a unique perspective from an Urban based integrated delivery model. He participated in the HFMA National Patient Friendly Billing Committee and is an advocate of the "patient side" of healthcare engagement.

Lodging

Soaring Eagle Casino & Resort: A block of rooms has been reserved through April 29 at \$129. A room reservation form is located on the Spring Conference webpage. No phone reservations will be accepted.

General

Regular golf attire is appropriate on Wednesday for the golf outing. Otherwise, business casual attire is appropriate throughout the conference.

